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Market Development Reports

April Food Price Survey in Cuba 2003

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Report Highlights:

Prices in a variety of food markets are compared between April 2003 and January 2003 and show that prices remained, stable in some markets and increased in others.

Includes PSD Changes: No
Includes Trade Matrix: No
Unscheduled Report
Miami [C11]
[C1]

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April 2003 Survey of Havana Markets**A. Summary**

In April 2003, U.S. Interest Section in Havana conducted a survey of the various Havana markets that showed the ration card or “libreta” experienced no significant supply changes and prices remained the same since their last survey in January 2003. Prices for basic foods in the free farmer’s markets or “agromercados” stayed the same, but prices for the same products in state and capped markets or “topados” have gone up since April 2002, indicating that the agromercados may indeed be responsible for driving prices up at the state and capped markets. The survey also showed that prices are lowest at Ejercito Juvenil del Trabajo (EJT) markets, with prices ranging from six to 32 percent lower than the next least inexpensive markets - the capped markets. The Imagenes and Ideal chain grocery stores offer basic rice and beans at higher prices than at the EJT markets, and their prices are comparable to prices at the agromercados. The Imagenes outlets also offer a variety of foodstuffs not found elsewhere, such as eggs and various processed meat products. The approximate exchange rate is US \$1.00 = 26 CP.

B. Items Surveyed

This survey covers essential, special occasion, and second tier food products. Essential food products are rice, beans, lard, small cooking plantains, squash or sweet potatoes, onions, garlic and tomato sauce. Most essential foods are listed on the ration card, although the monthly allowance is far less than what is needed. Items purchased for special occasions only are pork, lamb and ham. Second tier items for families with an above average salary or with access to dollars are: pineapple, papayas, oranges, limes, yucca, malanga (a tuber), cabbage, carrots, beets, eggplant, tomatoes, lettuce and cucumbers.

C. Food availability and prices in April 2003 in comparison to April 2002

1. Ration Card-Libreta

Prices for items on the ration card (libreta) remained the same over the past 12 months. The GOC recently announced minor changes in the ration book for the month of April. Due to maintenance on the soy yogurt production lines, soy yogurt will be replaced by 1.5 kg of powdered milk mixture. “Natural” yogurt will be replaced by something called “shaken” yogurt; which comes in plastic bags and has a smoother consistency than the so-called natural yogurt. The distribution of U.S. chicken leg quarters continues on a fairly regular basis replacing meat/soy mixtures for 0.70 CP/pound.

2. Free Farmers' Markets - Agromercados

The April 2003 survey shows that in comparison with April 2002, the only basic product with price increases are garlic, tomatoes, and cabbage in the agromercados. These markets tend to have the widest variety of fruits and vegetables.

Table 1. Price Changes for Product in the Agromercados

Products	Price, April 02	Price, April, 03	Change
Black Beans			0
Red Beans			0

White Beans			0
Red Onion			0
White Onion			0
Yucca			0
Malanga	4.00 /lb	3.50-4.00 /lb	-
Rice			
Garlic	1.50-2.00 /head	2.00-3.00 /head	+
Carrots			0
Beets			0
Cabbage	4.00-5.00 /lb	5.00 /lb	+
Tomatoes	2.00-7.00 /lb	3.00-10.00 /lb	+
Limes	1.00 each	0.50 /each	-
Oranges	1.00-2.00 /lb	0.50 /each	-
Pork Ribs	23.00 /lb	20.00 /lb	-
Pork Loin			0
Ham			0
Papaya	4.00-5.00 /lb	3.50-4.00 /lb	-
Pineapple	15.00 /lb	10.00-16.00 /lb	-

3. State Markets

Prices in State Markets increased for some basic products, in spite of the intended goal to drive down prices in all markets. The prices for these basic products went up approx. 20 to 50 percent.

Table 2. Price Changes for Products in the States Markets

Products	Price, April 02	Price, April, 03	Change
Black Beans	6.00	7.00	+
Red Beans	6.00	9.00	+
White Beans			0
Onion	4.00	5.00	+
Rice	4.00	3.50	-
Malanga *			
Yucca			0
Carrots *			
Tomatoes	1.20	2.00	+
Beets *			
Cabbage			0
Eggplant *			
Lettuce *			
Sweet Potatoes	1.25	1.50	+
Squash	1.50	1.30	-
Oranges *			
Limes *			

Pineapple *			
Papaya *			
Lamb Leg and Loin			0
Lamb Ribs			0
Pork Ribs			0
Viking ham (lunch meat style ham)	36.00	35.00	-

* These products were not available in the market.

4. Capped Markets - Topados

Prices fluctuated in comparing prices between April 2002 and 2003. Prices of these markets are published monthly in the GOC "Tribuna de La Habana" newspaper for the city of Havana.

Table 3. Price changes for Products in Capped Markets

Products	Price, April 02	Price, April, 03	Change
Black Beans	5.00 /oz	5.50 /oz	+
Red Beans	5.50 /oz	6.50 /oz	+
White Beans	6.00 /oz	7.00 /oz	+
Rice			0
Onions	8.00 /bunch	2.50 /bunch	-
Yucca			0
Big Cooking Plantain	2.40 /bunch	2.50 / bunch	+
Small Cooking Plantain	1.00 /bunch	0.60 /bunch	-
Carrots	2.00 /lb	1.00 /lb	-
Beets	2.00 /lb	1.00 /lb	-
Tomatoes	3.00 /lb	0.80 /lb	-
Lettuce	2.00 /lb	1.00 /lb	-
Malanga	2.60 /lb	2.50 /lb	-
Cabbage	1.50 /lb	1.00 /lb	-
Eggplant			0
Sweet Potatoes	1.00 /lb	0.80 /lb	-
Squash	1.00 /lb	0.70 /lb	-
Cucumbers			0
Oranges			0
Pork Leg and Loin	21.00 /lb	22.00 /lb	+
Pork Shoulder Blade			0

Pork Ribs	17.00 /lb	18.00 /lb	+
Pork Lard	14.00 /lb	15.00 /lb	+
Lamb			0
Viking Ham			0
Tomato Sauce, large			0
Green Beans			0
Okra			0
Watercress			0
Bananas			0
Pineapple	3.00 /lb	2.50 /lb	-
Limes	1.00 /lime	0.80 /lime	-
Papaya	1.50 /lb	1.40 /lb	-
Cucumber			0

5. EJT (Ejercito Juvenil del Trabajo) Market

The EJT market in the Vedado neighborhood had the lowest prices of all markets. Basic products offered were: rice for 3.30 CP, or six percent lower than in the capped market; black beans for 4.50, -22 percent; red beans for 5.50, -18 percent; white beans for 5.30, -32 percent; lard for 14, -7 percent; pork for 20, -10 percent; viking ham for 32, -6 percent; small cooking plantains for 0.55, -9 percent; and garlic for 1 and 1.20, -67-100 percent compared to prices at the State market (unavailable at the capped market.)

Some second tier products were also cheaper than in the capped markets: pineapple for 2.40 CP, -4 percent; cabbage for 0.90, -10 percent; malanga for 2.30, -8 percent; eggplant for 1.00, -50 percent; and cucumber for 0.80, -25 percent. Other products such as sweet potato, lamb, carrot and beet were available at the same price in the capped markets, and lettuce at 2.00 CP was more expensive than in the capped markets.

The quality of the products offered at the EJT market is generally good, and it is always the first purchasing option for any household. These markets are crowded enough during the week, but lines become unbearable on the weekends.

6. Organoponics

A survey in an organoponic in Nuevo Vedado found good prices and quality for a limited selection of fresh green vegetables. Yet the only basic product available at the time was garlic at 2 CP. Second tier products included beets (1.50), squash (1.50), cabbage (1.50) and eggplant (2.00). There were also good quality herbs and vegetables not included in our basic products such as celery, cilantro, parsley, watercress, chives, bean sprouts, spinach, radish and dried herbs and spices. This kind of market can supplement a typical Cuban family's demand for fresh green vegetables, but is not often the first choice.

7. Fish Shops

At two fish shops in the Vedado neighborhood items on offer were identical: Red snapper for 20 CP/pound, fish croquettes at 0.50 CP each, and canned tuna (around 200 grams) for 15 pesos. There were queues outside both shops.

8. Imagenes and Ideal variety shops

Prices are fixed and are the same in all shops in this chain. A survey of two, one in Vedado and another in Centro Habana found the Vedado shop had less variety, and very few of the products in our basic market basket could be purchased here. We found only imported rice for 4.00 CP/pound and black beans for 7.00 CP/pound. Several additional items were available which cannot be found in the markets mentioned above. Eggs were available for 2.00 CP each, as were meat croquettes (0.50 each), and sausage "pate" (17.00 CP/kg.), used as a spread, or to make homemade croquettes. In Centro Havana, imported rice was available for 4.00 CP/lb, along with both black and red beans for 7.00 CP/lb. There was a slightly larger variety of non-basic items including lentils (7.00 CP), bread (6.00 and 12.00 CP, depending on the size of the loaf), eggs (2.00 CP each), ham croquettes (0.80 ea), as well as ham pate (15.00 /kg); sausage pate (17.00 /kb), pork pate (12.00 /450.00 g), and a mixed meat pate (14.00 /kg).

Prices for rice and beans at these "variety stores" are more expensive than in the EJT, capped and state Agromercados, and so these stores will not be the first choice for the lowest-income Cubans. As noted, these stores offer foodstuffs not available in the above-mentioned markets, such as eggs, croquettes (meat, ham and chicken) and pates. Bread is a little bit more expensive than in the new non-rationed Cadenas del Pan, but the quality is better (Imagenes stores sell soft loaves, while the Cadenas del Pan sell hard baguettes -- although according to a Juventud Rebelde article, the bread sold at the "Cadenas de Pan" is made of a mixture of Canadian and recently-bought U.S. wheat.) The rice was labeled "imported," and the word on the street was that it came from the U.S. However, in the Centro Habana shop we could see large sacks of rice stamped with its provenance: China. Finally, U.S.- bought chicken, previously available from time to time in these stores for 25 CP/pound, was not available at the time of this survey. Much of the U.S.-purchased chicken is allegedly distributed through the ration card.

9. For further information on the opportunities for exporters of U.S. food products click on Cuba on our website: WWW.cbato.fas.usda.gov.

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